PACER Case Locator (PCL) User Manual

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Introduction

The PACER Case Locator (PCL) allows PACER users to search for cases in appellate, bankruptcy, and district courts. The following document will guide you through the updated PCL and show you how it works.

Index Page & Login

The index page (at pcl.uscourts.gov) highlights PCL features and updates, provides quick links to other useful sites, and allows you to log in using your PACER credentials.

To log in, click the Log in to PCL button at the top right of the page. This button takes you to the national PACER Login page, where you can enter your username, password, and client code (optional). To make the client code a requirement, go to Manage My Account on pacer.gov and select Set PACER Billing Preferences.

NOTE: The Client Code Format field will not accept a space or comma in the client code.

You may also go to Manage My Account after you log in to the PCL. Just click My Account in the navigation bar that appears at the top of the page and select Manage My Account.

The Quick Links box is available here and on the Welcome page. It provides links to pages and websites that may help your search.



Welcome

Upon successful login, unless you have set another page as your PCL home page, you will see the Welcome page. This is the default home page. To ensure you come directly here when you log in, select the Make this my PCL home page checkbox on the bottom left.

Use the Quick Searches section to go directly to the type of search you want. The My Recently Run Saved Searches section allows you to view up to 10 of your most recent saved searches.

Click **more** on the bottom right to see all your saved searches. You may save up to 100 cases and searches.

NOTE: Older saved searches will appear on this page if they have been run more recently than newer saved searches.

You can return to this page any time by clicking PACER Case Locator at the top of the screen.



Navigation Bar

The navigation bar at the top of the screen provides several search and account options.



- New Search: Allows the user to begin a search by case or party. It includes the following:
 - o Case Search
 - o Advanced Case Search
 - o Party Search
 - o Advanced Party Search
 - o Bankruptcy Search
- **Saved Items:** Lists searches and cases you have previously saved for later use. It includes the following:
 - Saved Searches
 - Saved Cases
 - o Batch Searches
- **Court Information:** Provides a list of court abbreviations and website links.
- **Settings:** Provides the following selections for users:
 - o Change Client Code
 - o User Options
- User dropdown: Allows the user to access account information. It includes the following:
 - o Manage My Account
 - o Billing History
 - o PACER Home
 - o Logout

New Search

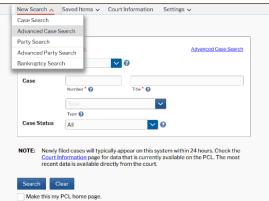
Case Search page

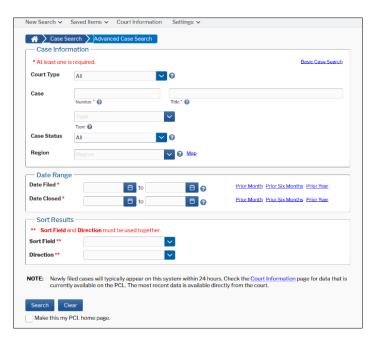
Perform a case search by using either the basic or advanced option. The basic search allows you to enter a case status, case type, number, title, and/or court type. The advanced option allows you to expand your search by including the court region and/or date range. It also allows you to choose how your search results will appear, using the Sort and Direction dropdowns.

If you do not select a court type, all courts will automatically be included in the search. If you select the appellate, civil, or bankruptcy court types, more fields will appear to help narrow your search.

See the Additional Search Fields by Court Type section below to learn more.







In the advanced search, you may use the Map link next to the Region field to select where you want to search.



After you enter the information, click Search to continue. To change the information you have entered, either highlight the text in the field you want to change or click Clear to start over.

If you use either of these pages often and want to go directly to one of them when you log in, select the Make this my PCL home page checkbox.

Party Search

Perform a party search by using either the basic or advanced options. The basic search allows you to enter the party name, party role, and/or court type. It also includes the Exact Matches Only and the Match Empty First and Middle Names checkboxes.

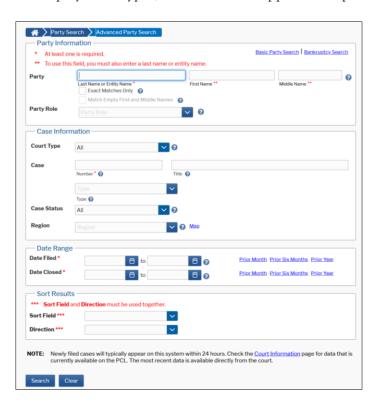
When you select Exact Matches Only, the Match Empty First and Middle Names checkbox is enabled. Party role codes are created and assigned by individual courts. This dropdown list includes the 30 most common party role codes.

If you do not select a specific court type, the Court Type field will default to all courts.

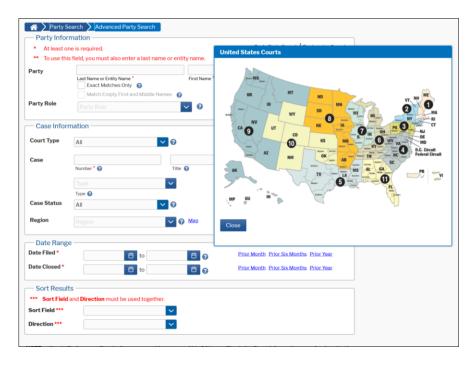


The advanced option allows you to expand your search to include case status, case number, region and/or date range. This page will allow you to search by party name and/or case number. It also allows you to choose how your search results will appear, using the Sort and Direction dropdowns.

If you do not select a court type, all courts will automatically be included in the search. If you select the appellate, civil, or bankruptcy court types, more fields will appear to help narrow your search.



In the advanced search, you may use the Map link next to the Region field to select where you want to search.



See the Additional Search Fields by Court Type section below to learn more.

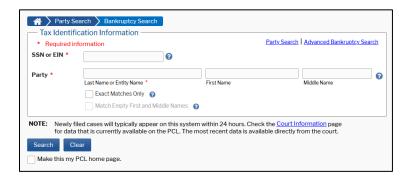
After you enter the information, click Search to continue. To change the information you have entered, either highlight the text in the field you want to change, or click Clear to clear all the information you entered and start over.

If you use either of these pages often and want to go directly to it when you log in, select the Make this my PCL home page checkbox.

NOTE: A last name is required if you enter something in the First Name or Middle Name field, OR when you enter something in the Four Digit SSN field.

Bankruptcy Search

This page allows you to search for a bankruptcy party by Social Security or Employer Identification/Tax Identification number, and by last name or business name.



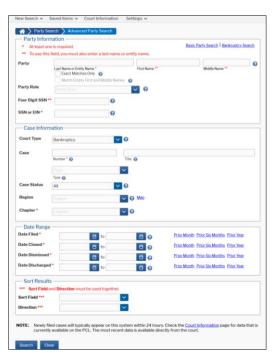
If you use either of these pages often and want to go directly to it when you log in, select the Make this my PCL home page checkbox.

Additional Search Fields by Court Type

You may search the PCL for case information in many ways. When running an advanced case or party search, additional search fields will appear depending on the court type you select when running an advanced search.

- Civil and appellate: Nature of Suit field
- Bankruptcy: Chapter, Date Discharged, and Date Dismissed fields





Search Results

Both the case and party Search Results screens allow you to perform several different tasks. The icon legend below the search results outlines those tasks.

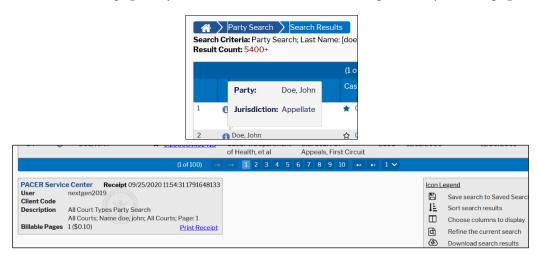


- Save icon: Allows you to save results to the Saved Searches section in the navigation bar
- tAla Enlarge/reduce font icon: Allows you to control the font size of your results
 - Sort icon: Allows you to sort your search results by the column selected
 - □ Column icon: Allows you to select which columns you want to display
 - Refine icon: Allows you to refine your search
 - Download icon: Allows you to download your search results
 - **Save case icon:** Allows you to save a case to the Save Cases section in the navigation bar
 - * Remove case icon: Allows you to remove a case from the Saved Cases section
 - **Show case parties icon:** Allows you to see the parties involved in a case

The search results display one page at a time by default. You may download all search results to a file in XML, JSON, or CSV formats.

When you roll over the "i" icon on the Case Search page, additional case information appears (e.g., jurisdiction, nature of suit, chapter, disposition, etc.).

A receipt at the bottom left of the screen shows the number of billable pages and the cost for the data on the current viewable page only. It does not include the cost for previously viewed pages.



If a search yields more than 5,400 results, you will have the option to run a batch search. For more information on batch jobs, see the Batch Searches section below. When a search yields fewer than 5,400 results, you can sort the information by case title, case number, court, date filed, and date closed. You may use the sort icon at the top right of the results to sort your results, or you may also select which columns to view using the table icon.



NOTE: Sorting your results prompts a new search that likely will be billable. A notice of the fee will appear, prompting you to either continue or cancel the search.

Saved Items

Saved Searches

The Search Results screen allows you to save your searches for later use. To save, select the disk icon on the Search Criteria line.

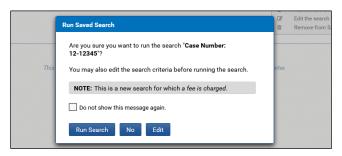


To go to your saved searches, click Saved Items on the navigation bar and select Saved Searches.

The Saved Searches page allows you to return to your previous searches, showing when you last ran the search, the type of search, and the criteria you used to run the search. Use the icons on the right side of the screen to either rerun, edit, or delete your search from the list.

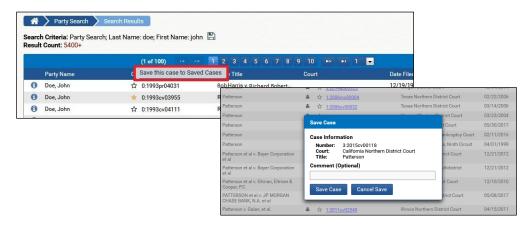


If you want to rerun the search, you will be charged a fee. There will be a notice to confirm you agree to the charges.

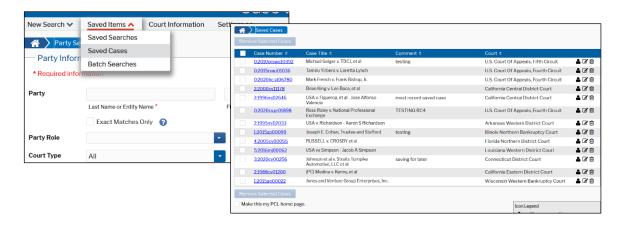


Saved Cases

The Search Results screen gives you the option to save any case for later use. Select the star icon in the Case Number column to save. When you click the star, a pop-up box appears, allowing you to enter comments about the case. Click Save Case, and the star next to the case will turn yellow, indicating you have saved the item. If you click the yellow star, the item will be removed from your saved cases.



The Saved Cases page allows you to return to your saved cases, and shows case number, case title, and court for your saved cases. When you click the case link, the page will redirect you to the court's CM/ECF site.



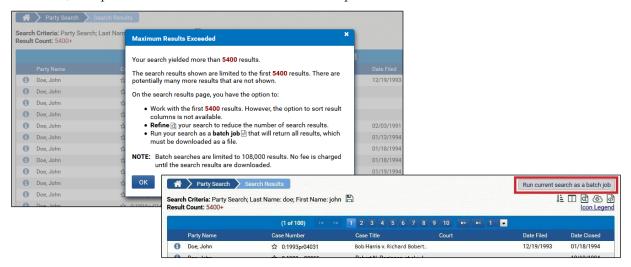
Use the icons on the right side of the screen to view the parties for that case or to delete it from the list. If you want to view parties, you will be charged a fee. There will be a notice to confirm that you agree to the charges.



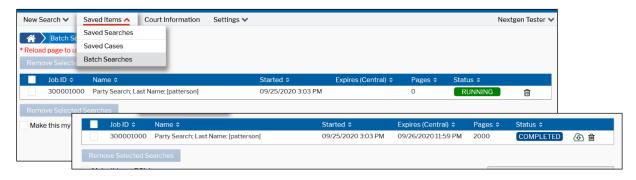
Batch Searches

Batch searches allow you to run a large search that returns results that can be downloaded as a file. The batch search icon appears at the top right when you receive more than 5,400 results. This search is limited to 100,000 results, and no fee is charged until the results are downloaded.

When the search results page first loads, a notice will inform you that maximum results have been exceeded, and provides further instruction on how to proceed.



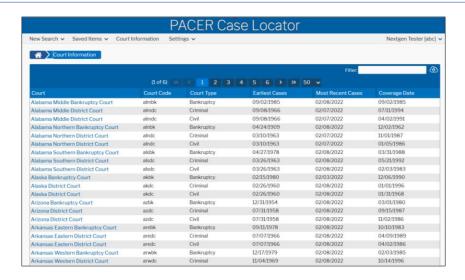
When you select the batch search icon, you may name the search for later use when you select Batch Searches from the Saved Items dropdown.



Court Information

This page provides a list of the court abbreviations used by the PCL. Click on the link to go directly to the court's website.

NOTE: The Coverage Date column shows the date from which a court has daily case access available. This may be different from the date that appears in the Earliest Cases column.



Settings

Change Client Code

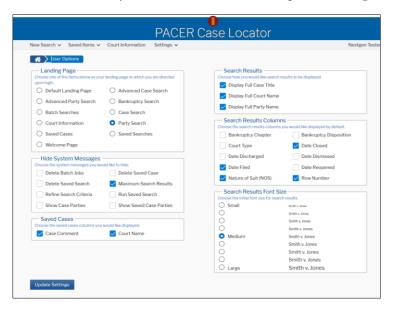
The Change Client Code option allows you to update the client code already entered, or enter a client code to track charges for future billings. The client code will appear in your billing history details when entered prior to a search.

When you click Change Client Code, enter the code in the Client Code field and click Submit.



User Options

This section allows users to further customize their landing page, hide system messages, and select which columns they want to appear on the search results page. Click the button(s) and/or checkbox(es) in each section to make your selection; then click Update Settings.

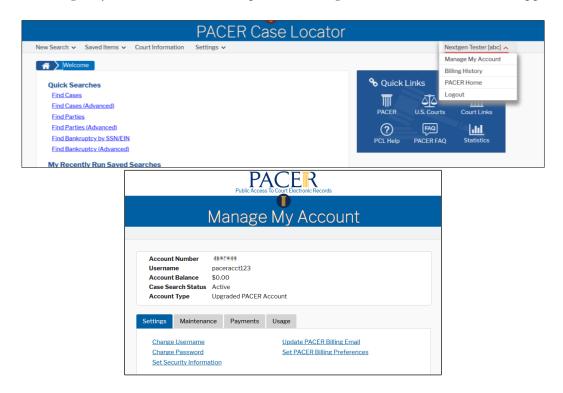


NOTE: The default options in the Search Results Columns section are only for the variably available columns. Columns such as Case Title, Case Number, and Court will always be shown.

User Dropdown

Manage My Account

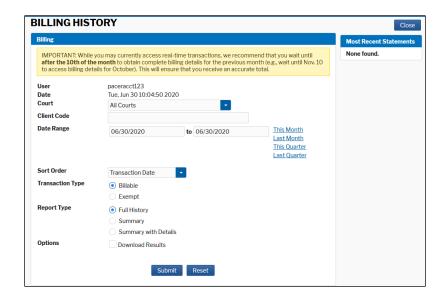
Use the My Account section of the navigation bar to access details of your PACER account. When you select Manage My Account from the dropdown and log in, the screen below should appear.



Billing History

The Billing History option takes you to the Billing History screen in Manage My Account. Here you can view transactions for one or all courts during a selected time period sorted by date, client code, or court.

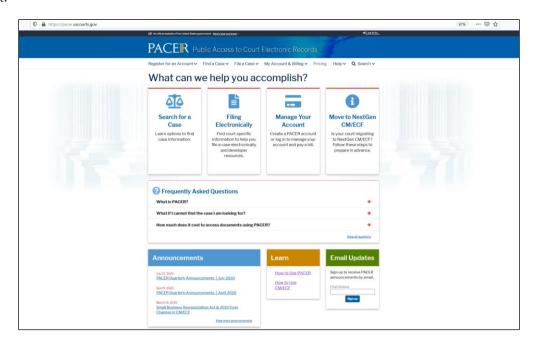




NOTE: The totals provided in the billing history also include charges from accessing a docket report from a court.

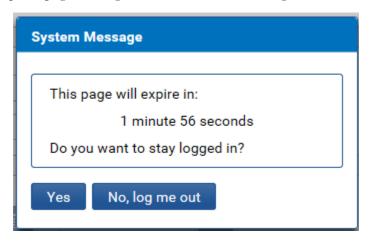
PACER Home

The PACER Home option takes you to pacer.uscourts.gov where you can select what you want to do next.



Page Expiration

When idle for 30 minutes on a page other than results (case or party search, saved items, etc.), the user will receive an expired page message. Click OK on the message to remain on the same page.



When idle for 30 minutes on a **results page**, the user will receive an expired page message. Clicking OK on this message redirects the user to their home page.



PCL Application Programing Interface (API)

The public PCL API allows users to programmatically search the PCL for federal cases or associated parties. This API uses the same search functionality as the PCL application and searches the same data set.

The API and documentation is available on the <u>Developer Resources</u> page. You can test in the QA environment at https://qa-pacer.uscourts.gov/.* You may also test your scripts in QA as part of your development lifecycle process or as needed.

NOTE: QA is a testing site that may occasionally be unavailable due maintenance. Also, some features for testing may not currently be available in the production environment.

You must have a PACER account to use the QA environment. To register for a PACER test account, visit https://qa-pacer.psc.uscourts.gov/pscof/registration.jsf. There is no charge for QA searches, so you may skip the credit card portion of the registration. Your QA account will be activated overnight.